



RESEARCH
CORPORATION

Processing Service Agreements

Updated on 10/22/2025

What is a Service Agreement?

A service agreement is a binding contract between MURC and vendor that outlines the terms and conditions of the business relationship. It protects both parties by establishing a clear meeting of the minds of the work to be done and the responsibilities of each party.



Determine if you will work with Pre-Award or Post-Award based on the type of agreement.

Pre-Award

Service agreements that are listed under **Contractual** in your grant budget.

This includes:

- Consultants & Consulting Fees
- Professional Services
- Contractual Services

Post-Award

Agreements for the following:

- Software
- Rental/Hotel Agreements
- Equipment
- Maintenance Agreements



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PRE-AWARD OFFICERS



Lisa Daniels,
Senior Contracts and
Grants Officer

adkins@marshall.edu



Chris Schlenker,
Senior Contracts and
Grants Officer

schlenker@marshall.edu



Amy Lynn Adkins,
Grants Officer

adkins387@marshall.edu



James Westbrook,
Grants Officer

westbrook6@marshall.edu



Grace Linz,
Grants Officer

linz3@marshall.edu

Find your Department's Officer at www.marshall.edu/murc/pre-award-services/

POST-AWARD/COMPLIANCE OFFICERS



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Rebecca Hill,
Director of Grants Compliance
& Purchasing Card
Coordinator

hill286@marshall.edu



Kayla Perry,
Grants Compliance
Administrator

starcher41@marshall.edu



Sydney Hunter,
Grants Compliance
Administrator

hunter161@marshall.edu



Mary Glen Rice,
Grants Compliance
Administrator

rice139@marshall.edu



Cyrah Moore,
Grants Compliance
Administrator

moore875@marshall.edu

Find your Department's Officer at www.marshall.edu/murc/post-award-services/

You can use the expense code list to determine how the line item is coded. For example: For items in yellow, you will work with Pre-Award to process your Service Agreement. The full version of the expense code list can be found [here](#).

Expense Code List

703B	Supplies	70543	Non-capitalized Software Licenses	Software licenses less than \$5,000; and all software licenses with a term of 1 year or less
703B	Supplies	70544	Computer Equipment less than \$5,000	Computer equipment less than \$5,000
703B	Supplies	70585	UAV (Drones) < \$5,000	Unmanned Aerial Vehicles (Drones) valued less than \$5,000
703B	Supplies	71211	Material/Supplies-Cap Asset Project	Material/Supplies purchased for a capital asset project
704B	Contractual	70251	Consultants & Consulting Fees	Agreement with an individual or business to provide consulting services
704B	Contractual	70252	Security Services	Agreement with an individual or business to provide security services
704B	Contractual	70253	Professional Services	Agreement with an individual or business to provide professional services
704B	Contractual	70254	Approved Vendor Contract < \$25,000	Expenditures approved for a limited exclusion from MTDC under a contractual arrangement. Procurements using these account codes require prior approval. Refer to MURC Subaward and Vendor Contract Guidelines for detailed information.
704B	Contractual	70255	Approved Vendor Contract > \$25,000	Expenditures approved for a limited exclusion from MTDC under a contractual arrangement. Procurements using these account codes require prior approval. Refer to MURC Subaward and Vendor Contract Guidelines for detailed information.
704B	Contractual	70257	Contractual Services	Agreement with an individual or business to provide contractual services not specifically included in another contractual account code
704B	Contractual	70258	Contracts-Research, Educational, Med	Contractual agreement for Research, Educational, or Medical services
704B	Contractual	70560	Attorney Legal Service Payments	Payments to attorneys for legal services provided (i.e., indigent defense counsel, other defense counsel, legal research, mental hygiene legal services and other related legal services.) Fees paid to attorneys and associated costs.
704B	Contractual	70570	Attorney Reimbursable Expense	Payments to attorneys for reimbursable expenses such as telephone, travel, postage, expert witness, court reporters, private investigations or other related expenses. Fees paid to attorneys for reimbursable expenses.
704B	Contractual	71282	Subrecipient Disbursement < \$25,000	Expenditures made under a sub-agreement with another entity, for the purpose of carrying out (part of) the program. For use with Federally funded projects only. Refer to MURC Subaward and Vendor Contract Guidelines for detailed information.



IMPORTANT

The this training will discuss the process for those service agreements that are only under the contractual grant budget line and will be reviewed by Pre-Award.

Step 1:

Determine if you are working with a Service Agreement or a Subaward.

If you need assistance making these determinations, please contact [your assigned Pre-Award Grants Officer](#). The [subaward vs. contract checklist](#) if available if needed to help make the determination. You will also need to provide a statement of activities that will be outsourced.

Step 2:

Determine if you are working with a **Service Agreement with Terms** or if a **MURC Service Agreement** is needed.

Service Agreement with Terms

Some vendors have their own agreement/terms that they send for review and signature. These are often larger sum contracts/agreements and often have a service period attached to them. These types of agreements must be sent to Pre-Award to review, negotiate, and approve.

Examples of Services: This can include engaging an evaluator like Dr. Jane Doe for program evaluation, hiring a vendor for website setup, curriculum development assistance, or meeting facilitation. They might also involve proprietary programs such as ASIST, Mental Health First Aid, QPR, etc. If uncertain, please seek clarification.

MURC Service Agreement

MURC has a service agreement form that is used when outside vendors do not have their own agreements. These agreements under \$10,000 do not require Pre-Award's approval before being sent to the vendor for signature.

Examples of Services: Presentations, curriculum development, website, meeting facilitation, subject matter experts, speaker honorarium, and student stipends.

PI/PD will need to complete the [MURC Service Agreement Form](#).

MARSHALL UNIVERSITY RESEARCH CORPORATION
SERVICE AGREEMENT

Vendor #		Agreement #	
Vendor Phone #		MURC Fund #	
Vendor Address:		MURC Org #	
Vendor Email:			

*Put the requisition number here.

I, _____ agree to perform the following service for Marshall University Research Corporation:

*Just a brief description is needed here.

Date(s) of Service* _____ to _____

The rate of pay shall be \$ _____ per _____ Select One _____ not to exceed _____.

All invoices must be submitted using the attached invoice template. Re: [o gpvy kndg o cf g wr qp tgegk vqhthe attached lsgo k gf lpxqlg hqt i qqf ulgtxlegu r tqxlk gf0Any invoices submitted on a different form than the one provided on page two of this agreement will be returned to the vendor .

Authorized Travel Expense:

☐ Will not be reimbursed.

☐ Will be reimbursed upon documentation in accordance with the policies set forth by MURC, not to exceed _____. *If this box is checked, PI/PD must following the MU Travel Policy found [here](#).

As an independent contractor, I am responsible for all employment taxes associated with the income I earn.

I certify that I am a citizen of the United States of America or an authorized alien eligible to work in the United States.

Vendor's Signature _____ Date _____ S.S.N./F.E.I.N. _____

APPROVED BY:

Project Director's Signature/Date

Marshall University Research Corporation Signature/Date

Step 3: Work with your Pre-Award Officer as needed to complete the following documents.

Agreements Between \$0 and \$24,999

- The Service Agreement
- MURC Addendum, when the agreement contains terms and conditions

For this threshold: You do not need to send to your Pre-Award Officer for review and approval. Proceed to Step 4.

Agreements Between \$25,000 and \$49,999

- Vendor Checklist is required.
 - If the vender was named in the agency-approved budget, select “yes” on the checklist and disregard the other questions.
- If not named in budget; choose one of the following:
 - **3 Quotes** from different vendors
 - The department may gather their own quotes.
 - Select the vendor with the lowest reasonable price.
 - Direct Award Form
 - Used when there is only one qualified vendor (e.g., a sole-source provider or specialized expertise).
- The Service Agreement
- MURC Addendum, when the agreement contains terms and conditions.

Agreements Greater Than \$50,000

- Vendor Checklist is required.
 - If the vender was named in the agency-approved budget, select “yes” on the checklist and disregard the other questions.
- If not named in budget; choose one of the following:
 - **Formal Bidding Process**
 - Conducted by the MU Purchasing Office (departments are not allowed to collect their own quotes at this level).
 - Direct Award Form
 - Used when there is only one qualified vendor (e.g., a sole-source provider or specialized expertise).
- The Service Agreement
- MURC Addendum, when the agreement contains terms and conditions.

Additional Step for Agreements \$25,000 and up

Email all documentation above to Pre-Award for review. Your Grants Officer will send an approval email copying [Kristen Webb, Contract and Subaward Compliance Officer.](#)

Kristen Webb, Contract and Subaward Compliance Officer.

Kristen will review of the agreement and supporting documents. She will ensure that Dr. Maher's signs the agreement and that it is sent to the MU Purchasing Office to get converted to a Purchase Order (PO). She will also reach out to the MU Purchasing Office on the PI's behalf to check the status of a PO.



Kristen Webb,
Contract & Subaward
Compliance Administrator

kristen.webb@marshall.edu

Step 4:

Send the service agreement, ***MURC Service Agreement Invoice (PDF)** and **MURC Addendum (if applicable)** to the vendor for signature. While awaiting the vendor signature, proceed to Step 5 for vendor setup.

***Please note** - The MURC Service Agreement Invoice is required to be completed by the vendor when invoicing against a Purchase Order (PO) to ensure standardized and compliant documentation of services provided. This ensures all required information is captured for auditing and financial reporting, streamlining the payment process.

Invoices should not be submitted with the signed Service Agreement.

ATTACHMENT 1

AGREEMENT #:
VENDOR NAME:

SERVICE AGREEMENT
INVOICE

To be completed by VENDOR

DATE(S) OF SERVICE:
RATE OF PAY: :
VENDOR CONTACT:
VENDOR CONTACT EMAIL:
VENDOR ADDRESS:
VENDOR PHONE NUMBER:

To be completed by
MARSHALL UNIVERSITY RESEARCH CORP.

FUND:
PI:
AGREEMENT POP:
AGREEMENT AMOUNT:

Final YES ☐ NO ☐

INVOICE #

DATE

DESCRIPTION	QUANTITY	UNIT PRICE	AMOUNT
Please provide a brief description of service(s) with charge(s)			-
			-
			-
			-
			-
			-
			-
			-
			-
			-
			-
			-
			-
			-
			-
			-
			-

I certify to the best of my knowledge and belief that this report is correct and complete and that all outlays are for the purposes set forth in the award documents

Signature
Date

Approved by:
Project Director's Signature
Date

TOTAL AMOUNT DUE \$

Step 5:

Determine if the vendor has been set up by using the **FTIDEN** screen in **Banner**. You can also use Banner screen **FTMVEND** to view the vendors address to ensure you are working with the correct vendor.

If not set up in Banner: Email the vendor and provide them with this [link](#). See the email template to send to the vendor [here](#). This dynamic form will get the vendor set up in the Banner payment system. It is the PI/PD responsibility to check back in Banner to see if the vendor has been set up.

If you need to update vendor information, such as their address, please email Kim Fry, and she will handle the update.

Banner Screen FTIIDEN

Visit Banner [here](#) and use the screen **FTIIDEN** in the search bar. This screen will be used first to locate the vendor number (FEIN# if working with an organization). You will need to use screen **FTMVEND** to view the vendors address.

1. Click on the light green box under the ‘Last Name’ field

2. In the ‘Last Name’ box, type the Vendor’s name.

Hint: If you are unsure of the exact name, you can try a variation of what you think it may be and type the wildcard, %, after the name. It will pull up all IDs in Banner that have those characteristics.

3. Hit F8, or click ‘Go’

4. It will populate all the options with your search criteria

5. The vendor number (FEIN #) can be located in the ID box.

6. Write down the vendor number (FEIN #). It will be needed to view the address in Banner screen **FTMVEND**.

The screenshots illustrate the steps to search for a vendor in the Banner FTIIDEN screen. The first screenshot shows the initial screen with a light green box under the 'Last Name' field highlighted. The second screenshot shows the 'Last Name' field populated with 'REBECCA' and the 'Go' button highlighted. The third screenshot shows the search results table with the vendor number 'W00071707' highlighted in the ID column.

ID	Last Name	First Name	Middle Name	Entity Indicator	Change Indicator	Vendor	Financial Manager	Agency	Grant Personnel	Proposal Personnel	Name Type
W00071707	REBECCA	REBECCA		Person	ID	Yes	No	No	No	No	
E00143935	REBECCA	REBECCA		Person	ID	Yes	No	No	No	No	
942404110	Apple Computer Inc			Corporation	Name	Yes	No	No	No	No	
942404110	Apple Inc			Corporation		Yes	No	No	No	No	
901069422	Applegate	Ruth	Ann	Person		Yes	No	No	No	No	
901184841	Appleton	Rebecca		Person		Yes	No	No	No	No	

Banner Screen FTMVEND

Visit Banner [here](#) and use screen **FTMVEND** in the search bar. This screen is used to view the vendors address to ensure you are working with the correct vendor.

- 1. Type in the vendor number and click ‘Go’
- 2. On the next screen select ‘Address’ to check that you are working with the correct vendor.
- 3. If the vendor has multiple address records, you will need to use the arrows to move through the records to find the one with the ‘Inactivate Address’ box unchecked. This is the current address for the vendor.

ellucian

Vendor Maintenance FTMVEND 9.3.22 (BanProd)

Vendor: * 901698389

Corporation:

Last Name: Bruce

First Name: Brittany

Middle Name: Renee

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

Vendor Maintenance

Additional Information

Vendor Types

Address

E-mail

Taxes Collected

Area Code

Phone Number

Extension

Fax Area Code

Fax Number

Fax Extension

Source

Delivery Point

Correction Digit

Carrier Route

Registration Number

☐ Inactivate Address

Record 4 of 17

Setting up a New Vendor



The Marshall University Purchasing Office has a registration form that the vendors must complete. The PI/PD will need to email the vendor with the below language, where they will answer some question and attach a copy of there W-9.

Email to send to vendor:

Hello - I hope you are well. As a new vendor you will need to be set up in the Marshall University payment system, you will need to complete a Vendor Registration Form that has been provided online for your convenience.

The form can be found here <https://www.marshall.edu/purchasing/resources/vendor-registration/>

Once you are on the Office of Purchasing webpage, click on Complete Vendor Registration Form. You will follow the instructions, if there is a field that does not apply to you, fill in NA in that space. At the top left you will see TIN: please add your Social Security number there, as the purchasing office is working to change the label for that spot.

Next, click on the W9 link in blue and fill out a W9 for tax purposes.

Please let me know once you have completed this.

Thank you,

Step 6:

Create a Requisition using screen [FPAREQN](#) in [Banner](#).

Note: A full list of account codes with descriptions can be found [here](#). You can reach out to your Grant Compliance Administrator with questions.

Creating a Requisition

Visit Banner [here](#) and use screen **FPAREQN** in the search bar:

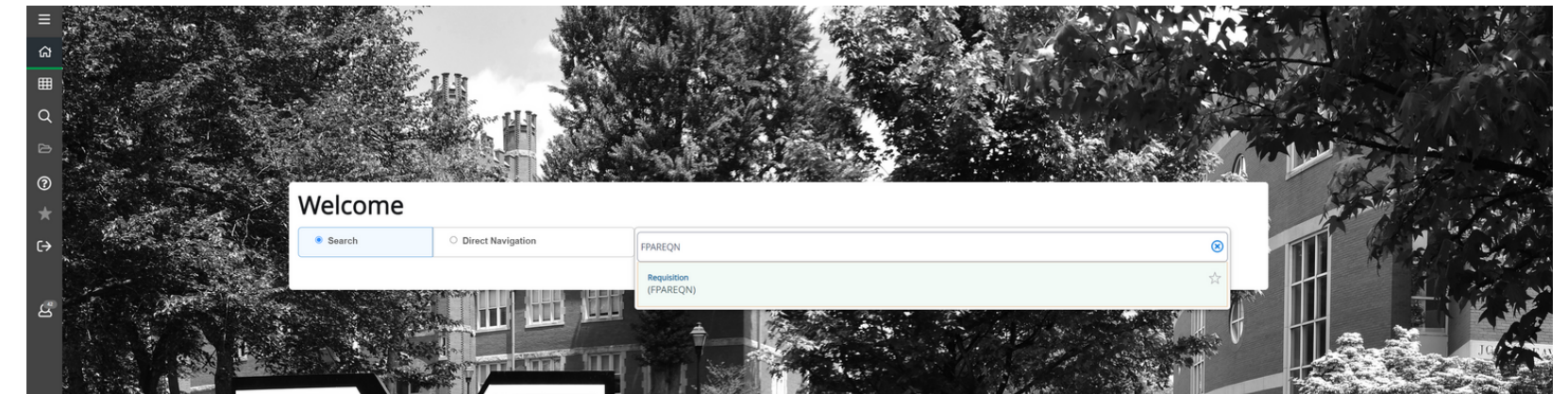
On the next screen type NEXT in the Requisition Number box.
Then hit GO or use Alt Page Down.

First Screen: Requestor/Delivery Information

Fill in:

1. **Order Date** – This should prefill
2. **Transaction Date** – This should be prefilled
3. **Delivery Date** - Type in the date for the end of the Fiscal Year
4. **Requestor** – Your name (This should be prefilled)
5. **Organization** – This is the org. that is associated with the fund
6. **COA** - 2 (MU Research Corporation).
7. **Ship to** - AEC
8. **Attention to** - Deanna Lacy or Brittany Bruce

Hit the down arrow or hld down the Alt & Page Down buttons to continue

A screenshot of the Banner system 'Requestor/Delivery Information' screen. The screen is titled 'Requisition: NEXT' and 'FPAREQN 9.3.24 (BaniProd)'. It has several tabs: 'Requestor/Delivery Information', 'Vendor Information', 'Commodity/Accounting', and 'Balancing/Completion'. The 'Requestor/Delivery Information' tab is active. It contains fields for 'Requisition' (NEXT), 'Order Date' (07/19/2023), 'Transaction Date' (07/19/2023), and 'Delivery Date' (09/30/2023). There are also fields for 'Comments', 'Commodity Total' (0.00), and 'Accounting Total' (0.00). The 'Requestor/Delivery Information' section includes fields for 'Requestor' (Brittany Bruce), 'Organization' (1524 MURC COE for Addiction and Recovery), 'COA' (2 MU Research Corporation), 'Email', 'Phone Area Code', 'Phone Number', 'Phone Extension', 'Fax Area Code', 'Fax Number', 'Fax Extension', 'Ship To' (AEC), and 'Street Line 1'. There are also fields for 'Street Line 2', 'Street Line 3', 'Contact', 'Attention To' (Brittany Bruce), 'Building', 'Floor', 'City', 'State or Province', 'Zip or Postal Code', 'Nation', 'Area Code', 'Phone Number', and 'Extension'. Numbered callouts 1 through 8 are placed over various fields: 1 on Order Date, 2 on Transaction Date, 3 on Delivery Date, 4 on Requestor, 5 on Organization, 6 on COA, 7 on Ship To, and 8 on Attention To.

Creating a Requisition continued.

Third Screen: Commodity/Accounting

Reminder: Write down the requisition number at this step.

Commodity Section:

Fill in:

1. **Description** - Keynote Speaker for Event or Service Agreement
2. **U/M** - This will be DOL (dollars)
3. **Quantity** - Amount listed on the agreement.
4. **Unit Price** - 1

Remember: Use the TAB button to move to the next section.

Requisition: R2400305

▼ REQUISITION ENTRY: REQUESTOR/DELIVERY

Requisition: R2400305
 Order Date: 07/19/2023
 Transaction Date: 07/19/2023
 Delivery Date: 09/30/2023

Comments:
 Commodity Total: 0.00
 Accounting Total: 0.00
☒ Document Level Accounting

☐ In Suspense
☐ Document Text

Requestor/Delivery Information Vendor Information **Commodity/Accounting** Balancing/Completion

▼ COMMODITY

Item	Commodity	Description	U/M	Tax Group	Quantity	Unit Price	Commodity Text	Item Text	Add Commodity
		Keynote Speaker for Event	DOL		1.00	1,500.0000	☐	☐	☐

Extended Amount: 1,500.00
 Discount: 0
 Additional: 0.00

Tax:
 Commodity Total: 1,500.00
 Document Total:

☐ Distribute

▼ ACCOUNTING

Sequence	COA	Year	Index	Fund	Orgn	Acct	Prog	Actv	Proj	NSF Override	NSF Suspension
2	2	1	2	2	2	2	2	2	2	☐	

Extended Amount:
 Discount:
 Additional:
 Tax:
 FOAPAL Total:
 Document Total:
 Remaining:
 Commodity Amount:

Creating a Requistion continued.

Accounting Section:

Hold Alt & Page Down buttons to continue to the accounting section and always use the TAB button to move through each section.

Fill in:

- 1. Fund
 - 2. Orgn Acct - You can find the appropriate account code by selecting the three dots in the Acct box.
Example: Contractual Services 70257
- Hit F10 to save and then Alt Page Down

▼ ACCOUNTING

Sequence	COA	Year	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj
1 2		24		107173	1524	7083D	0030			

⏪ ⏩ 1 of 1

10 ▾ Per Page

	%	USD
Extended Amount	☐	1,500.00
Discount	☐	0.00
Additional	☐	0.00
Tax	☐	0.00
FOAPAL Total		1,500.00
Document Total		1,500.00
Remaining		0.00
Commodity Amount		

Creating a Requisition continued.

Balancing/Completion Section:

- Everything on this page will be prefilled.
- **IMPORTANT:** Make sure to write down the requisition # that is listed at the top of the page. Once you complete the requisition there is no way to go back and get the requisition #.
- At the bottom left side of the screen hit complete.

BALANCING/COMPLETION

Vendor

522208632

Sodexo America LLC

☐ Vendor Hold

COA

2

MU Research Corporation

Requestor

Brittany Bruce

Organization

1524

MURC COE for Addiction and Recovery

Currency

Exchange Rate

Commodity Record

1

Count

Input Amount

1,500.00

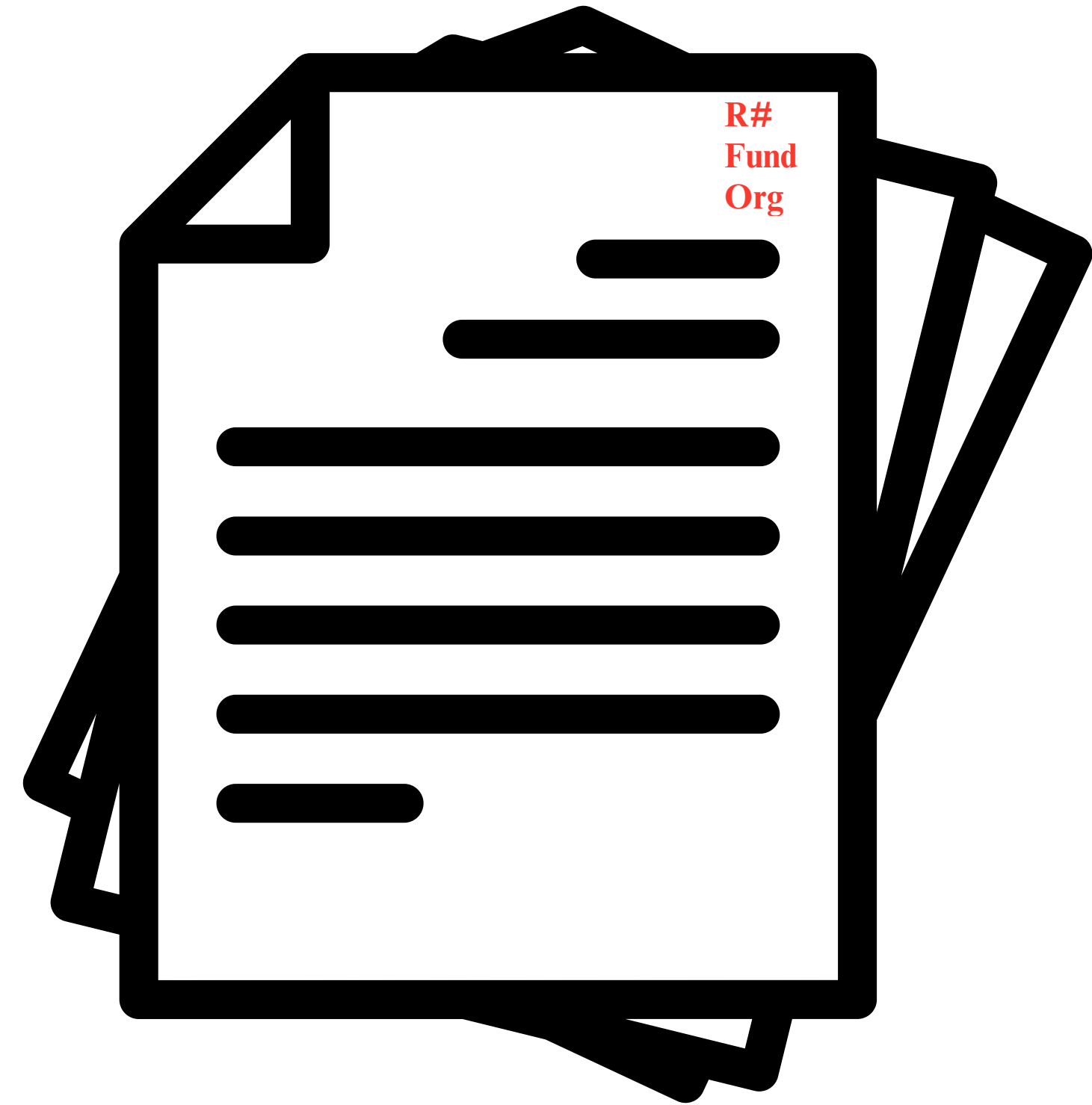
Converted Amount

AMOUNTS

	Input	Commodity	Accounting	Status
Approved Amount	1,500.00	1,500.00	1,500.00	BALANCED
Discount Amount	0.00	0.00	0.00	BALANCED
Additional Amount	0.00	0.00	0.00	BALANCED
Tax Amount	0.00	0.00	0.00	BALANCED

Step 7:

Include the requisition number, fund number and org number on the top right of the service agreement and MURC Addendum (if applicable).



Step 8:

Email the service agreement, required documents and vendor checklist in separate .pdfs to your Grants Compliance Officer. She will sign and send an approval emailed to Kristen Webb.

Step 9:

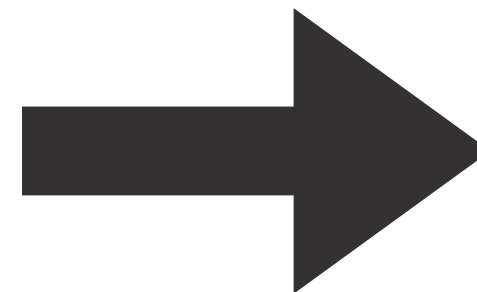
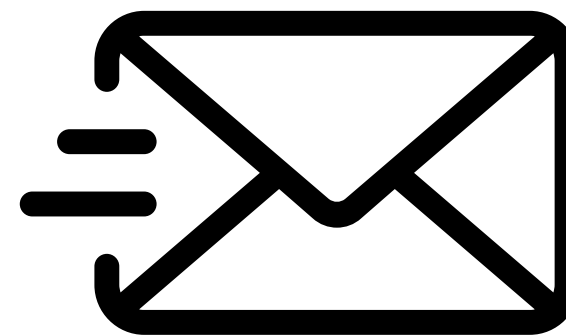
Kristen Webb will review and send to Dr. Maher for final signature.

*If the requisition number was not created/provided, Kristen will flag for you to provide.



Step 10:

Once signed, Kristen Webb will send the fully executed agreement to the MU Purchasing Office to be converted to a Purchase Order (PO). The contact in the department will be cc'd on the email to the Purchasing Office.



Step 11:

Once the Purchasing Office has created the Purchase Order (PO), a copy of the fully executed agreement will be sent to the vendor, PI and/or the department administrator for their records.

Note: the RC in the purchase order number is simply a Research Corporation indicator.

PURCHASE ORDER				
	Office of Purchasing 125 Old Main One John Marshall Drive Huntington, WV 25755-4100 Voice: (304) 696-2598 Fax: (304) 696-3333			
Number: RC- P Please show this number on all packages and documents related to this order				
Date: 11/06/2023				
Vendor: 550484662 Woodbrook Health Services Inc	Ship To: ARTHUR WEISBERG FAMILY APPLIED ENGINEER AEC 1676 THIRD AVE HUNTINGTON WV 25703 Requisition #: R2401212			
Invoice to: Marshall University Research Corporation; Accounts Payable; One John Marshall Drive, Huntington, WV 25755-8100 Voice: 304-696-6203 Fax: 304-697-3861				
Address all other correspondence to the Purchasing Department.				
PLEASE ACKNOWLEDGE RECEIPT OF THIS ORDER AND GIVE DEFINITE DELIVERY DATE				
Item	Item Description	Units	Unit Price	Extended Price
1				
FOB:		TERMS:	DISCOUNT: \$0.00	
PURCHASING AGENT: Melanie Gallaher (304) 696-6356		ADDL CHARGES: \$0.00		
AUTHORIZED SIGNATURE: 		TOTAL TAXES: \$0.00		
Attorney General's Signature (if required):		TOTAL:		

Next Step: Once the PO has been step up the vendor can begin invoicing.



Let's review what we
learned!

Who would you work with if
you have an agreement for
rental space for a
conference?

True or False: If the service agreement is under \$10,000 Lisa with Pre-Award will need to review.

Which of the following service agreements should be handled by Post-Award? (Select all that apply)

- A) Professional Services
- B) Software Agreements
- C) Rental/Hotel Agreements
- D) Contractual Services
- E) Equipment Agreements



CENTER OF EXCELLENCE
FOR RECOVERY

Service Agreement Invoicing Process

Updated on 12/4/2024



When invoicing against a Purchase Order (PO), the vendor is required to complete the [MURC Service Agreement Invoice](#) to ensure all relevant information is properly recorded and that the invoicing aligns with the terms of the service agreement. It is all right if the vendor attaches their own invoice, but they must use the MURC Invoice. **This document must be completed by the vendor.**

The agreement number (RC-P# or P#) must be included on all invoices. This number is on the final PO (fully executed service agreement), a copy of which the vendor should have on file. Including this number helps to streamline the processing and ensures accurate tracking of the contract.



Office of Purchasing
125 Old Main
One John Marshall Drive
Huntington, WV 25755-4100

Voice: (304) 696-2598 Fax: (304) 696-3333

PURCHASE ORDER

Number: **RC- P:**

Please show this number on all packages and documents related to this order

Date: 11/06/2023

550484662

Vendor: Woodbrook Health Services Inc

Ship To: ARTHUR WEISBERG FAMILY APPLIED ENGINEER
AEC
1676 THIRD AVE
HUNTINGTON WV 25703
Requisition #: R2401212

Invoice to: Marshall University Research Corporation;
Accounts Payable; One John Marshall Drive, Huntington, WV
25755-8100
Voice: 304-696-6203 Fax: 304-697-3861

Address all other correspondence to the Purchasing Department.

PLEASE ACKNOWLEDGE RECEIPT OF THIS ORDER AND GIVE DEFINITE DELIVERY DATE

Item	Item Description	Units	Unit Price	Extended Price
1				

FOB:

PURCHASING AGENT: Melanie Gallaher (304) 696-6356

AUTHORIZED SIGNATURE: 

Attorney General's Signature (if required):

TERMS:

DISCOUNT: \$0.00

ADDL CHARGES: \$0.00

TOTAL TAXES: \$0.00

TOTAL:

Complete the Vendor Section:

The vendor must fill out all necessary details in the "To be completed by vendor" section of the invoice. This includes the vendor's name, contact information, and other requested details.

To be completed by VENDOR

DATE(S) OF SERVICE:

RATE OF PAY:

VENDOR CONTACT:

VENDOR CONTACT EMAIL:

VENDOR ADDRESS:

VENDOR PHONE NUMBER:

Assign an Invoice Number:

AGREEMENT #:

SERVICE AGREEMENT

VENDOR NAME:

INVOICE

The vendor will assign a unique invoice number and include the date of the invoice.

Step Check the Final Invoice Box:

If applicable, the vendor should check the box indicating whether this is the final invoice for the service agreement.

DATE	
INVOICE #	
Final YES	☐
NO	☐

Provide Service Details:

The invoice must include a brief description of the services provided. For vendors paid on an hourly basis, a detailed breakdown of the days worked, hours worked per day, and the rate of pay should be listed. This breakdown ensures transparency and clarity for both parties involved.

[illegible]

Total Amount and Signature:

All invoices must include the total amount for the services rendered.

The vendor must sign and date the invoice, certifying that the charges are true and accurate as per the agreement.

I certify to the best of my knowledge and belief that this report is correct and complete and that all outlays are for the purposes set forth in the award documents

TOTAL AMOUNT DUE \$

Signature Date

Approved by:

Project Director's Signature **Date**

PI Review and Approval:

The Principal Investigator (PI) will review the charges and ensure they align with the services described in the service agreement. Once the PI is satisfied, they will sign the invoice on the designated line at the bottom of the form.

Submit for Processing:

The signed invoice, along with any required supporting documentation, should be sent to [Kristen Webb, Contract and Subaward Compliance Officer](#) and copying [Kristen Martin, Senior Finance Officer](#) for review. Once reviewed and approved, it is submitted for payment.

Ensure Payment Received:

PIs are responsible to ensure that the vendor has received the payment. You can use Banner Screen [FGIENCD](#).